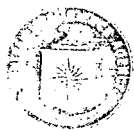
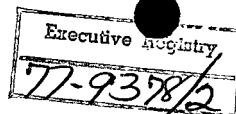


The Director
Central Intelligence Agency

25X1



Washington, D.C. 20505



NEAC
900

25 October 1977

Dear Zbig:

Attached is a copy of our National Intelligence Estimate on Southern Africa which I think the President might find interesting. The Estimate, which was actually published in August, takes a look at South Africa and some of the surrounding states, and addresses the prospects for change in the region during the next three to five years. Several of the more significant key judgments and illustrations have been highlighted and tabbed for your information.

Yours,

STANSFIELD TURNER

Attachment

EXECUTIVE REGISTRY FILE

NEAC

SECRET/ []

25X1

2047-77

STAT

DCI/NIO/AF:

MEMO FOR: DCI

VIA : D/DCI/NI

FROM : NIO/AF

SUBJECT : Transmission of National Intelligence Estimate on
Southern Africa to Dr. Zbigniew Brzezinski

Two attachments:

- 1) Memo from DCI to Dr. Brzezinski
- 2) NIE 70-1-77

Distribution:

Original - Addressee (w/both atts)

- 1 - SA/DCI (w/att 1 and copies of tabbed portions of att 2)
- 1 - D/DCI/NI (w/att 1 and copies of tabbed portions of att 2)
- ① - ER (w/att 1)
- 1 - NIO/AF (w/both atts)
- 1 - NIO/RI (w/att 1)

SECRET

25X1

THE DIRECTOR OF CENTRAL INTELLIGENCE

WASHINGTON, D. C. 20505

Executive Registry

77-93781

National Intelligence Officers

17 October 1977

MEMORANDUM FOR: The Director of Central Intelligence

VIA : Deputy to the Director for National Intelligence

FROM : National Intelligence Officer for Africa

SUBJECT : Transmission of National Intelligence Estimate on
Southern Africa to Dr. Zbigniew Brzezinski

1. Action Requested: That you sign and forward the attached
National Intelligence Estimate to Dr. Brzezinski.

2. Background: Per your note of 9 October, we have prepared trans-
mittal documents to forward to Dr. Brzezinski the National Intelligence
Estimate on Southern Africa. Selected key judgments and illustrations
have been tabbed and highlighted as requested.

25X1

Attachment

/s/ Stansfield Turner

APPROVED: _____
Director of Central Intelligence

DISAPPROVED: _____
Director of Central Intelligence

DATE: _____

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Secret

NATIONAL INTELLIGENCE ESTIMATE

Southern Africa

Secret

NIE 70-1-77

2 August 1977

Copy No 453

SECRET

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KEY JUDGMENTS

Potential changes in the hitherto dominant positions of the white racial communities in South Africa, Rhodesia, and Namibia are once again subjects for intense debate and arduous international negotiation. The debate is not new; the negotiations and the pressures that these negotiations reflect and that accompany them are, if not entirely unprecedented, at least new in the far-ranging character of their objectives: majority rule in Rhodesia and Namibia, and some form of power-sharing with the black majority in South Africa.

This paper focuses on South Africa. It attempts to locate the sources of potential change among the major elements of South African society, to gauge both their strength and the malleability of the existing political and economic structure under internal stresses and external pressures, and to make a current estimate of what kinds of change might occur during the next three to five years. The paper also discusses the impact of developments in Rhodesia and Namibia on those in South Africa, and in the course of this discussion offers an assessment of how the Rhodesian and Namibian situations appear to be moving.

Against this background, our principal judgments are as follows:

South Africa

- The white community, despite its internal divisions, will not be prepared within the period of this Estimate to make significant concessions in the direction of power-sharing with the black majority.
- Even movement in the direction of reducing the more petty manifestations of racial discrimination will come slowly, because no white South African government can afford to move very far ahead of the dominant prejudices of the white community as a whole, although domestic and international pressures may speed the process to some degree.
- In the economic arena, while absolute improvements in the material well-being of those blacks who are employed will occur gradually during the period of this Estimate, as they have at periods in the past, there will be a serious and growing problem of black unemployment due to a combination of demographic developments and the inherited body of white-imposed custom and legislation which denies economic opportunity to blacks and keeps the purchasing power of the black community low.

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- The protest efforts of the black communities will not produce significant changes in the South African political and economic system within the period of this Estimate. But they have already begun to produce a change in the political climate which may have considerable long-range significance. These protests, which almost certainly will take the form of sporadic outbreaks of widespread disorder and urban terrorism as well as strikes and other nonviolent demonstrations, will create an atmosphere of heightened racial tension. Thus the next three to five years, unlike the 1965-75 decade of quiescence, is likely to be a period of increasing pressures for change, marked by intensified debate within South Africa over the government's racial policy.
- The resources available to the South African government for resisting change will remain formidable during the period of this Estimate, and we believe white South Africans will be able to cope with any physical challenge they are likely to face. The armed forces are well trained, well equipped, and because they are overwhelmingly white, share the outlook of the white community as a whole. The police, although they are nearly half nonwhite, do not yet show significant cracks in morale or effectiveness. While we expect that black policemen in some areas will come under stress, the government has foreseen this and is preparing for it.
- The South African armed forces also remain by far the most effective military establishment in black Africa, and will have nothing to fear from the regular military establishments of other African countries, either singly or in combination. They will also contain any likely guerrilla effort from outside the country.
- The South African economy is relatively resistant to international economic sanctions, and will remain so for the period of this Estimate even in the unlikely event that such sanctions received widespread international support. The government has prepared for the possibility of sanctions by stockpiling, and the impact of sanctions would be to slow growth, and thus to deny what white South Africans have come to regard as normal expectation, rather than to bring the whites to their knees. Blacks would feel the material impact of sanctions far more than whites, and this might further fuel protest movements. Sanctions thus will be more effective in their political and psychological aspects than as economic warfare measures during the next three to five years.
- The one area in which South Africans appear to be especially sensitive to pressures for change is in their strong desire to be accepted as members of the Western community. Yet, their relative isolation and identification as the pariah of the Western

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world have discomfited, but not induced significant change amongst the South African whites. In the short run at least, we believe that the chances are that the South Africans will dig in their heels in resisting pressures for significant internal change. We cannot judge at this time what the impact of persistent Western pressure would be over the long term in building up or breaking down South African resistance to change.

Rhodesia

- Rhodesia will achieve majority rule during the period of this Estimate, but the effects of this on developments within South Africa during this period will be marginal. The longer term effects of how majority rule is introduced to Rhodesia will be substantial on South Africa's regional relationships, however. A relatively moderate, cooperative government in Zimbabwe would likely offer South Africa a fresh opportunity to attempt, especially in economic relationships, a policy of "opening to the north" from which both Zimbabwe and South Africa would derive substantial material benefits. If, on the other hand, an independent Zimbabwe becomes an arena for the rivalries that now plague the nationalist movement, it is likely to emerge eventually as a militant confrontation state. The importance of economic ties with South Africa, however, would probably act as a restraint on Zimbabwe's aggressiveness.

Namibia

- There are signs, developed by the efforts of the UN Contact Group, that South Africa is making a major reassessment of its strategy toward and its future relationship with Namibia. We think that the South Africans believe that arrangements can be made that protect their essential interests. They hope to retain both profitable economic and useful defense ties with an independent Namibia. If their hopes turn out to be illusory, we think that the South Africans would still find it difficult to disengage from the negotiation process, given the presumable consequences for their relations with the West. We are unable to agree, however, on the strength of South Africa's determination to preserve a military position in Namibia and full sovereignty over Walvis Bay. Certainly, during the course of the negotiations and transition period, the South Africans will continue to reassess their options.

Communist Factors in Southern Africa

- We doubt that the Soviets will engage in any radically new types of activity during the next three to five years. The central

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features of the Soviet presence in southern Africa will continue to be the provision of military hardware and training to black liberation movements and to new black governments, together with vigorous diplomatic support in international forums. The Soviets will avoid being placed in situations where they might be called upon to furnish troops—other than advisers—of their own, although they are likely to continue to make use of gunboat diplomacy when the risks are low.

- Cuba will continue to collaborate with the USSR in policy toward southern Africa. Castro regards this arena as one in which his broader international interests find room to play, but financial and logistical constraints, as well as ideological affinity, will keep him close to the USSR here. Castro is not likely to send Cuban troops into action directly against South Africans in Namibia nor in offensive operation into Rhodesia, although they may come to operate defensively in the latter situation.
- China will remain active in this region; some Chinese effort will go toward supporting the liberation movements and the front-line states, primarily to compete with the Soviets. The Chinese are at a disadvantage, however, in competing with the Soviets because of their inability to meet the military needs of the front-line states.

Western Europe, Japan, and Israel as Factors

- The major West European countries will be very reluctant to engage in serious pressures against South Africa during the period of this Estimate. The UK cannot afford to do so; France and West Germany will not wish to forgo the economic benefits. All will be swayed to some degree, however, by appeals on human rights grounds, which in Europe come from Scandinavia and the Dutch as well as from elements within the other West European countries. Japan's situation will be similar.
- The Israelis will be doing a running assessment of the risks involved in their ties with South Africa—mainly the dangers that might be posed for their relations with the US and their prospects for resuming contacts with black African governments. But, on balance, we think that Israel will continue to develop relationships with South Africa.

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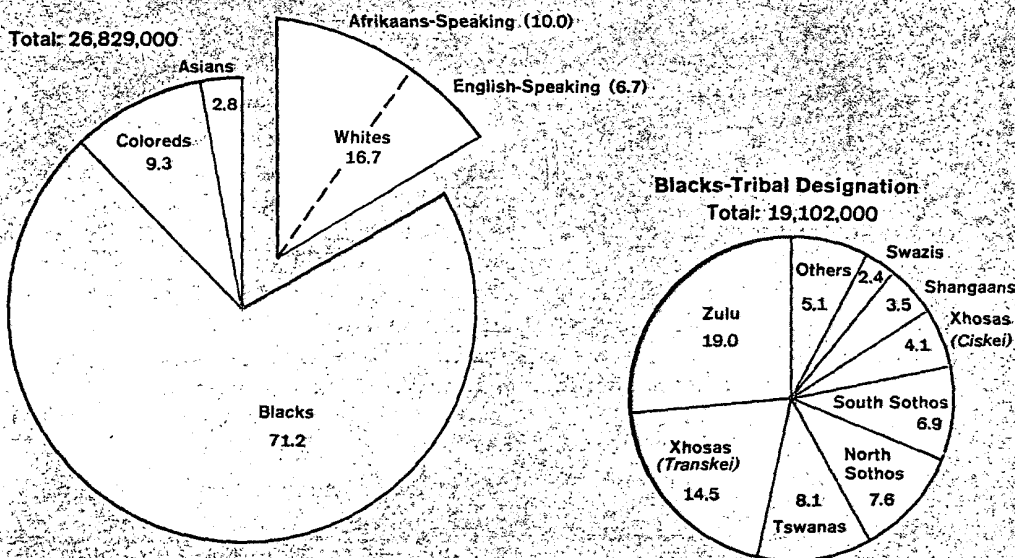
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are divergent in background, experience, and outlook (see Figure 1). There are more than 10 major tribes with numerous subgroupings within each. Two of these tribes, the Xhosa and the Zulu, individually outnumber all white South Africans. Moreover, over half of the Africans now reside in urban areas, and a large number of these blacks are detribalized to various degrees. There are thus few unifying cultural or social forces and the government, through its policy of separate development, encourages maintaining tribal identification and perpetuates intertribal rivalries and rural-urban splits.

29. South African population statistics, particularly those in respect to blacks, point to changes in the demographic patterns by the end of this century. By the year 2000 the black population is expected to have doubled and will then outnumber the white population by 73.4 to 14 percent instead of 71.2 to 16.7 percent as now. How this population is distributed between rural and urban areas will depend on how the government implements its policies, but it is virtually certain that there will be some increase in the black urban townships, which are already overcrowded and volatile.

SOUTH AFRICA: Population Estimates by Percent, 1 July 1977¹

Figure 1



1. The figure for the total population is a projection by the US Department of Commerce Foreign Demographic Analysis Division. It is based on an official mid-1976 South African estimate. Figures for the individual ethnic groups were calculated from official South African percentages for each group. The figures for the Afrikaans-speaking and English-speaking communities were calculated from the generally used ratio of 3:2 for Afrikaans-speakers to English-speakers.

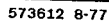
Differing natural growth rates among South Africa's racial communities, accompanied by likely changes in emigration and immigration patterns, will produce a change in racial composition of the country's population in the decades ahead. A recent report by the South African Department of Statistics projects an overall population of about 47,000,000 by the year 2000, of which 14 percent would be whites, 73.4 percent blacks, 9.9 percent coloreds, and 2.7 percent Asians. (The many variables that affect the size of a population group over time—especially in an unstable country such as South Africa—should be considered when using long-term projections. Escalation of racial conflict and eventual large-scale white emigration could present a drastically different racial composition well before the year 2000.)

The South African blacks are currently about evenly divided between those living in the homelands and those in the white areas (not counting about 1,500,000 migrant workers who take temporary employment in the white areas). Of those living in the white sector, 55 percent are in the towns and cities, 45 percent in rural areas. As long as the black labor force remains an essential element in the South African economy and as long as the homelands fail to attain economic self-sufficiency (both of which appear sure bets for the foreseeable future), an increase in the number of blacks in the increasingly volatile townships surrounding the white urban areas is likely.

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Figure 2



Deputy for National Intelligence

77-9398/1
2 November 1977
NFAC
12 OCT 77

NOTE FOR: The Director

1. In response to your request, [redacted] asked at Commerce whether they would be willing to distribute OER's steel report to selected industrial people. Commerce agreed in principle that they would help in distributing papers of this sort. However, they are reluctant to push this report, dated May 1977; they believe it should be updated first.

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2. Maurice Ernst has indicated that OER could do the update, but he believes that the paper should not be pushed given the highly political nature of the steel question. The paper, though a good one, emphasizes trade factors rather than the domestic structural aspects, the latter being the really important concern in the U.S. OER is also concerned that it might be distorted and exploited by special interest groups.

STAT

[redacted]
Robert R. Bowie

EXCLUSIVE REGISTRY FILE NFAC

Distribution

- Orig - DCI
- 1 - Acting DDCI
- 1 - ER
- 1 - D/NFAC Chrono
- 1 - NFAC file
- 1 - D/OER
- 1 - NIO/PE

SA/DO
Secret

STAT

NATIONAL INTELLIGENCE ESTIMATE

Southern Africa

Secret

NIE 70-1-77

2 August 1977

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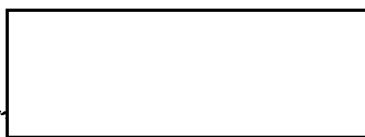
The Director of Central Intelligence

177-9378

Washington, D. C. 20505

STAT

10/9



I did brief Pres on
this report before it came out.

Let's try highlighting
Key Judgments section a
little - plus tab & in-ltr
Fig 1 & 2 & draft
memo to ZB for
suggested reply to Pres -

ST

NFAC